Training Process Checklist

Phases	Major Deliverables	Task(s)	Estimated Due Date	✓
Plan	Training Needs Assessment	Receive training request form		
		Conduct audience analysis		
	Training Plan	Identify learning objectives		
		Identify content scope		
		Determine delivery strategy		
		Identify stakeholders		
		Identify logistics strategy		
	Project Plan	Create workplan (tasks, deliverable schedule, check-in points)		
		Develop budget		
		Identify roles (role map)		
		Create task order		
	Project Management	CONDUCT KICK-OFF MEETING		
		Oversee project communication, tasks, and deliverables [+ sponsor...]		
Design	Instructional Design Plan	Create content outline		
		Conduct SME/customer review of content outline		
		Conduct instructional strategy session (create storyboards and activities)		
		Conduct stakeholder review of storyboards		
	Evaluation Strategy	Plan evaluation/measurement tools & methods (dry run, pilot, course, TOT)		
	Project Management	CONDUCT INSTRUCTIONAL STRATEGY SESSION		
		Update workplan		
		Review and update logistics checklist		
		Create communication plan		
		Oversee project communication, tasks, and deliverables [+ spons...]		
Build	Course Materials	Create detailed course content		
		Create instructor/facilitator materials (guide, slide presentation, etc)		
		Create participant material (guide, artifacts, etc.)		
		* Create online training materials		
		Create media (video, graphics, audio, animation)		
		Build help/performance support processes (help desk, job aids, etc.)		
	Evaluation/Measurement	Develop evaluation/measurement tools & methods (for pilot/course)		
	Testing	SUBMIT DRAFT OF MATERIALS (FOR SME REVIEW)		
		PLAN & CONDUCT DRY RUN		
		* Plan & conduct dev/system tests if online		
		PLAN & CONDUCT PILOT		
	Training of Trainers (TOT)	Develop TOT course (structure, content, materials, logistics)		
		Create trainer toolkit		
		Create TOT evaluation		
	Training Logistics	Solicit and select trainers		
		Select sites and schedule trainers		
		SUBMIT TRAINING ANNOUNCEMENT TO FSAU COMMUNICATIONS		
		ENTER TRAINING WORKSHOP DATA INTO THE LMS		
		ADVERTISE TRAINING PROGRAM (PUBLISH ANNOUCEMENT)		
		SUBMIT CAMERA-READY COPY OF MATERIALS		
		Package materials (printing & shipping)		
	Project Management	Create training maintenance plan		
		Oversee project communication, tasks, and deliverables [+ sponsor sign-off]		
Deliver	Training of Trainers (TOT)	CONDUCT TRAINING OF TRAINER (TOT) SESSION(S)		
		Collect and submit TOT evaluations		
	Logistics Support	Provide logistics support		
		Conduct registration		
	Ongoing Training	DELIVER TRAINING		
		Conduct trainer and trainee evaluations		
		Submit training evaluations to FSAU		
		Provide ongoing support		
	Project Management	Implement training maintenance plan		
		Oversee project communication, tasks, and deliverables		
Assess	Evaluation & Analysis	Collect training evaluations (trainer and participant evaluations)		
		Analyze evaluation/measurement results		
		Summarize evaluation/measurement results		
		Submit final report: Make recommendations/create action plans		
	Celebration & Lessons Learned	Conduct lessons learned sessions with development team(s)		
		Conduct celebration session		
		Document lessons learned		
	Project Management	Oversee project communication, tasks, and deliverables		

Callout notes:

- **Coduct the Kick-off ASAP** — Include logistics & communications reps
- **Coduct Instructional Strategy Session** — 2-4 weeks after kick-off meeting
- **Submit Draft of Materials** — 1 week for dry run
- **Plan & Conduct Dry Run** — At least 8 wks before delivery, 4 wks before pilot
- **Plan & Conduct Pilot** — At least 4 weeks before TOT
- **Submit Training Announcement to FSAU Communcations** — At least 8 wks before delivery start date
- **Enter Training Workshop Data into the LMS** — At least 6 weeks before delivery & prior to advertising the training
- **Advertise Training Program** — At least 6 weeks before delivery and after data entered into LMS
- **Submit Camera-Ready Copy of Materials** — 1 week after pilot (allow 4 weeks to print)
- **Conduct Training of Trainer Sessions** — 4 weeks after pilot/2 wks before delivery begins
- **Deliver Training** — Beginning 2 weeks after TOT

Tasks that are CAPITALIZED (and highlighted in gray) are key milestones.

* Indicates step if training is online